



Massachusetts Housing Finance Agency

**One Beacon Street
Boston, MA 02108**

**REQUEST FOR QUALIFICATIONS
FOR
PROFESSIONAL SERVICES**

**ARCHITECTURAL AND DESIGN REVIEW OF AN
EXISTING MULTIFAMILY PROJECT**

TABLE OF CONTENTS

Section

- I. STATEMENT OF PURPOSE
- II. BACKGROUND
- III. SCOPE OF WORK
- IV. CONTENT OF QUALIFICATIONS
 - A. Transmittal Letter/Firm Description/Executive Summary
 - B. Experience and Qualifications
 - C. Diversity, Equity & Inclusion Plan
 - D. References
 - E. Project Plan
 - F. Adverse Actions
 - G. Conflict of Interest
 - H. Pricing
- V. METHOD OF SELECTION/AWARD
 - A. Contract Award
 - B. Evaluation of Qualifications
- VI. SCHEDULE AND INSTRUCTIONS
 - A. Due Date
 - B. Summary Project Timetable
 - C. Single Point of Contact
 - D. Bidder's Conference
- VII. ADDITIONAL PROVISIONS
 - A. Confidentiality
 - B. Non-Discrimination
 - C. Rights of MassHousing
 - D. Use of Respondent's Qualifications
 - E. Respondent Qualifications Costs

I. STATEMENT OF PURPOSE

MassHousing is requesting qualifications pursuant to this Request for Qualifications (“RFQ”) to provide architectural and design review of an existing multifamily project located in the Greater Merrimack Valley Area of Massachusetts (the “Project”). The Project is a former mill building comprising approximately 400,000 square feet, recently converted from industrial use into a 180-unit residential housing development. The intent is to identify qualified firms with a proven track record in adaptive reuse and complex renovation projects. Qualified respondents may be asked to perform additional services for MassHousing, in addition to the services described above.

II. BACKGROUND

MassHousing provides mortgage financing and related services targeting the affordable housing market in Massachusetts. Created in 1966 by an act of the Massachusetts Legislature, MassHousing operates as a self-supporting, independent authority of state government. MassHousing raises mortgage capital through the issuance of taxable and tax-exempt revenue bonds and is organized around six primary business lines: Rental Business Development, Rental Underwriting, and Rental Management, Home Ownership Lending Operations, Home Ownership Productions, Home Ownership Servicing and Operations, and the Mortgage Insurance Fund. Support services such as accounting and financial reporting, legal, and information technology are provided by a group of corporate offices.

MassHousing’s Rental Management business line oversees a portfolio comprised of mortgage loans originated by MassHousing’s Rental Business Development and Rental Underwriting business lines, and this entire portfolio is serviced in-house. MassHousing’s servicing of this portfolio includes regulatory oversight and compliance with requirements stemming from various housing subsidy contracts. Rental Management also provides regulatory and subsidy contract administration services to other entities, principally the United States Department of Housing and Urban Development (“HUD”).

MassHousing’s Home Ownership Servicing and Operations business line oversees a portfolio of single-family mortgage loans to first time homebuyers and other qualified borrowers. These loans were originated by MassHousing-approved lenders across the state under MassHousing’s auspices and then subsequently purchased and serviced by MassHousing.

The Mortgage Insurance Fund (“MIF”) was established to provide an additional source of primary mortgage insurance for certain borrowers. MIF is the primary insurer for single-family loans made by MassHousing and is also an insurer approved by the Federal Home Loan Mortgage Corporation (Freddie Mac), the Federal National Mortgage Association (Fannie Mae) and Massachusetts community banks and credit unions.

For additional information about MassHousing, please visit our web site at www.MassHousing.com. For a detailed overview of MassHousing, including its financials, please review the most recent MassHousing Information Statement, and Annual Report. Both of these documents as well as others can be found on MassHousing.com website at <https://www.masshousing.com/en/about/investors>.

III. SCOPE OF WORK

The selected firm will be responsible for preparing a comprehensive report that addresses the following tasks:

- Review of Plans and Specifications – Conduct a detailed analysis of the Project’s existing plans and specifications, focusing on proposed improvements to the building envelope and mechanical systems.
- Evaluation of Existing Conditions – Assess the actual improvements made to the building envelope and mechanical systems. Provide a comparative analysis between the intended design and the current state of the Project.
- Review of Previous Recommendations – Evaluate prior recommendations provided by other design professionals, contractors, and system manufacturers, offering insights on the implementation feasibility and effectiveness of these recommendations.
- Feasibility Analysis – Provide a feasibility analysis regarding the Project’s current design, identifying discrepancies between the planned and existing conditions, along with actionable recommendations for improving the Project’s performance. The report should include cost estimates for proposed improvements.
- Coordination with Additional Design Professionals – As necessary, identify and coordinate with MEP engineers, building science experts, and other professionals to ensure comprehensive review and recommendations.

IV. CONTENT OF RESPONSES

This RFQ is designed to elicit all information considered essential to evaluating each respondent’s qualifications. There is no intent to limit the content of the response. Respondents may include such additional information as may be appropriate, or offer alternate solutions, but should not exclude any information requested in this RFQ.

In support of MassHousing’s longstanding commitment to confront the housing challenges facing the Commonwealth to improve the lives of its people, MassHousing will prioritize organizations who align with the Agency’s values and its commitment to diversity, equity, and inclusion.

All qualifications should contain the following information:

A. Transmittal Letter/Firm Description/Executive Summary

Responses must be accompanied with a transmittal letter on company stationery or letterhead and signed by an individual legally authorized to bind the company. The transmittal letter should identify the individual(s) involved in preparing the response, as well as a single point of contact

for the company. The transmittal should contain or be accompanied by a detailed description of the firm (including background on the firm's financial stability) as well as a summary of the contents of the qualifications.

MassHousing is an equal opportunity employer and seeks to provide procurement, contracting and employment opportunities for minority, women, veterans, LGBT, and persons with disabilities. We encourage responses from entities which describe strategies to actively promote and recruit diverse vendors, workers, and contractors. Responses that describe the benefits of direct, specific, and measurable access to employment and contracting opportunities created by the proposed project will be favorably reviewed.

B. Experience and Qualifications

Respondents should provide a list of projects in which their firm has been involved. Descriptions for each project should include the firm's role in the project, identify specific challenges encountered, and discuss outcomes. The responses should highlight the relevant experience of the firm and of the key personnel that will be providing the services hereunder. Interested firms must demonstrate the following qualifications:

- Experience in Adaptive Reuse – Provide detailed information on not fewer than five (5) completed adaptive reuse projects. Emphasize experience in converting industrial or other non-residential buildings into residential spaces, highlighting projects of similar scale and complexity.
- Experience with Historic Designation Projects – Include information on any renovation or adaptive reuse projects that involved historic preservation and compliance with historic designation requirements.
- Experience with Decarbonization Projects – Highlight experience in projects involving decarbonization efforts, specifically the conversion of fossil fuel-based systems to electric, and other sustainability measures.
- Experience Fixing Substandard Systems – Highlight the firm's capability to assess and rectify systems that were improperly implemented or deviated from intended specifications.
- Proposed Project Team – Submit a list of key personnel proposed for the Project, including the Principal, Project Manager, and key engineers. Include resumes and specific project experience for each team member.

C. Diversity, Equity & Inclusion Plan

Please provide the following information about your organization's commitment to the principles of diversity, equity and inclusion and related activities.

Organizational and Workforce Diversity

1. Describe your organization's activities that reflect your commitment to diversity, equity and inclusion and the impact, if any, it has on your organization's competitive position.
2. Describe the diversity makeup of your Board of Directors and executive leadership team. Please provide the breakdown by gender and ethnicity.
3. Please provide documentation if your company is certified as a diverse business (M/WBE, veteran-owned VBE, LGBT-owned, and/or disability-owned business).

D. References

Please provide a list of at least three (3) companies that MassHousing can contact as references for which the respondent has provided similar services within the past three years, including:

1. Name, address, and phone number of each company.
2. General description of the engagement; and
3. Contact name and telephone number(s) of those who can talk knowledgeably about their experience with the respondent and any system issues that arose during the implementation of their project.

E. Project Plan

Provide a step-by-step project plan for performing and completing the solicited services as described herein. Your Project Plan should include:

1. Key personnel and their roles in providing the service.
2. Your general approach and methodology in providing the services.
3. Details about project phases, including a list of deliverables, timelines, milestones, and use of subcontractors.
4. Expectations of MassHousing's staff to assist with the process.

F. Adverse Actions

Please include a description of any insurance claim, criminal investigation or material litigation against your firm or members of your firm in the last ten (10) years, any instances in which your firm has been debarred by state or federal government and the circumstances for the debarment, as well as a summary of any formal complaints filed against your firm or members of your firm containing allegations of discrimination in the last ten (10) years.

G. Conflicts of Interest

Please describe any facts you are aware of that would result in a conflict of interest with MassHousing if a contract was awarded to your firm.

H. Pricing

Please provide a detailed pricing structure for delivering the services hereunder (use a matrix or chart if necessary). Responses should include a comprehensive rate schedule detailing hourly rates for all personnel involved and any subcontractors.

V. METHOD OF SELECTION/AWARD

A. Contract Award

Contract will be awarded to the respondent whose qualifications is determined to be the most advantageous to MassHousing, in its sole discretion, taking into account price and other evaluation criteria as set forth in this RFQ.

MassHousing reserves the right to negotiate the terms of the contract(s), including the contract amount(s), with the selected respondent prior to entering into a contract. The contents of the respondent's qualifications and this RFQ, and any amendments thereto, shall become contractual obligations if an engagement of services ensues. Contract selections should be distinguished from a contract award. Contracts will not be considered awarded until negotiation of terms is final. Failure of a successful respondent to accept these obligations in contractual agreement may result in cancellation of a respondent's selection. If contract negotiations cannot be concluded successfully with any selected respondent(s), MassHousing may, in its sole discretion, negotiate a contract with the next ranked respondent. MassHousing may elect to engage more than one respondent if, after reviewing all qualifications, it is determined to be in the best interests of MassHousing.

One or more contracts may be awarded as a result of qualifications submitted in response to this RFQ. MassHousing reserves the right to award contracts for individual deliverables if that is advantageous to MassHousing. By submitting a qualifications pursuant to this RFQ, the selected respondent agrees to enter into an agreement with MassHousing in substantially the same form as MassHousing's Standard Services Agreement attached hereto as Attachment B.

B. Evaluation of Qualifications

Qualifications submitted in accordance with this RFQ will be evaluated by a selection committee composed of MassHousing staff. All respondents will be notified of the outcome of the review of their qualifications. Qualifications will be evaluated pursuant to the following criteria:

- Responsiveness to requirements of RFQ
- Financial and organizational stability of respondent
- Understanding of proposed scope of services and approach in addressing MassHousing's specific needs and objectives

- Quality and timeliness of proposed work plan
- Technical capabilities (in terms of personnel, equipment, and materials) and management plan (including staffing of key positions, method of assigning work, and procedures for maintaining level of service
- Diversity, Equity & Inclusion plan
- Demonstrated experience and qualifications of respondent and respondent's staff assigned to perform the solicited services
- Ability to provide a cost-effective solution to meet the needs of MassHousing; and
- Demonstrated successful past performance based on references.

VI. SCHEDULE AND INSTRUCTIONS

A. Due Date

Please submit your qualifications electronically to the following address by 3:00 pm Eastern Time on October 18, 2024.

Email responses should be sent to **Christopher Burns at cburns@masshousing.com**. Qualifications received after the response deadline will, at MassHousing's discretion, be rejected.

B. Summary Project Timetable

The anticipated timetable for the evaluation process and subsequent project activities are summarized below:

<u>Date</u>	<u>Task</u>
October 4, 2024	Distribute RFQ
October 18, 2024	RFQ Response Deadline
October 25, 2024	RFQ Evaluation, complete Follow-up, and Reference Calls
November 1, 2024	Final Selection

This anticipated timetable is for reference purposes only and is subject to change at MassHousing's sole discretion. A copy of this RFQ, as well as any addenda thereto, will be posted on www.masshousing.com/rfp. Schedule changes and/or other RFQ revisions, including date, time, and place changes, if any, will be posted on the website on a weekly basis. In addition, after the RFQ Response Deadline, changes may be sent directly to Respondents at the contact information provided.

C. Single Point of Contact

All inquiries regarding this RFQ should be directed in writing to:

Christopher Burns
cburns@masshousing.com

In order to maintain a fair and impartial competitive process, MassHousing will only answer questions or comments regarding the RFQ that are submitted in accordance with the terms of this section. MassHousing will determine, in its sole discretion, whether any inquiry requires a formal response which, if required, may take the form of an addendum to this RFQ. Respondents who initiate private communications with other MassHousing personnel regarding material issues involving this RFQ may be disqualified.

D. Bidder's Conference

No formal bidder's conference is scheduled.

VII. ADDITIONAL PROVISIONS

A. Confidentiality

By accepting to respond to this RFQ, respondent expressly acknowledges that MassHousing's business procedures, ideas, inventions, plans, financial data, contents of this RFQ, and other MassHousing information are the sole and exclusive property of MassHousing. The Respondent also agrees that it will safeguard such information to the same extent it safeguards its own confidential material or data relating to its own business information that is of a confidential or proprietary nature. Federal and state laws require that MassHousing maintain an information security program to protect certain personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing. This information includes the following: (1) nonpublic personal information protected by the Safeguards Rule of the Gramm-Leach-Bliley Act (15 U.S.C. § 6801 et. seq.) and implementing regulations (16 C.F.R. Part 314); consumer reports protected under the federal Fair Credit Reporting Act, as amended by the 2004 FACT Act (15 U.S.C. § 1681 et. seq.); and any other information pertaining to individuals subject to data security, data security breach notification, and identity theft prevention laws. If MassHousing grants respondent access to its networks or otherwise allows respondent to view personal information related to individuals who are customers, business partners, vendors, or employees of MassHousing, respondent shall comply with all federal and state laws protecting such information while working at MassHousing's facility, while using MassHousing's protected information, and while connected to MassHousing's network. It is MassHousing's policy to employ the services of outside investigative agencies to conduct background checks on individuals with access to its networks. In submitting its qualifications, respondent acknowledges that it will be required to submit to such background checks of its impacted employees at MassHousing's request. If awarded the contract, respondent shall comply with MassHousing's information security program by (1) implementing and maintaining measures

designed to meet the information security objectives of federal and state laws; (2) using and disclosing customer information solely for the purposes of performing the contract; and (3) providing MassHousing with copies of the results of any internal and external audits or tests of the effectiveness of MassHousing's information security measures.

B. Non-Discrimination

In connection with the performance of work under this contract, the respondent agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, disability, sex, marital status, familial status, sexual orientation, gender identity or expression, pregnancy, genetic information, veteran status, alienage or citizenship status, ancestry, national origin, or any other characteristic protected by applicable federal, state, or local laws. This provision shall include, but not be limited to the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The respondent further agrees to take affirmative action to ensure equal employment opportunities for those applicants of protected groups referred to above. The respondent agrees to post in conspicuous places, available for employees and applicants for employment, notices setting forth the provisions of the nondiscrimination clause.

C. Rights of MassHousing

MassHousing is soliciting competitive qualifications pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement to do so. MassHousing accordingly reserves the right to accept any qualifications; to withdraw or cancel this RFQ; to modify or amend, with the consent of the proponent, any qualifications prior to acceptance; to reject any or all qualifications or waive any informality and otherwise to affect any agreement that MassHousing in its sole judgment, deems to be in its best interest.

D. Use of Respondent Qualifications

All material submitted becomes the property of MassHousing and will not be returned. If the respondent intends to submit confidential or proprietary information as part of the qualifications, any limits on the use or distribution of that material should be clearly delineated in writing. Respondent should be aware that MassHousing is a quasi-public governmental agency subject to Massachusetts General Laws, Chapter 66, sections 1-18, therefore, any information submitted to MassHousing (even if marked as confidential or proprietary) may be subject to disclosure under the Massachusetts Public Records Law.

MassHousing reserves the unrestricted right to copy and disseminate the respondent materials for internal review.

E. Respondent Qualifications Costs

All respondent qualifications related costs, including but not limited to, qualifications preparation and presentation, system demonstrations, documentation, site visits, in-depth briefing for

MassHousing, and negotiation meetings are entirely the responsibility of the respondent and shall not be chargeable in any manner to MassHousing. MassHousing will bear the costs of sending its own staff to respondent headquarters and respondent client sites if such meetings are required.